

SMART Software Bundles Applied on July 21, 2012

Over the past two years, the SMART team has been evaluating and testing a series of software updates provided by our software supplier, PeopleSoft. Emphasis has been placed on issues where the software updates changed the functionality or fixed an existing problem. These issues and changes are described in the information below. Many of these are improvements to the functionality of the system. Users may notice there are other subtle changes that are not included on this list. The list below does not include those types of changes - for example, where a field is moved to a slightly different place on a page.

Thank you for your patience during the past few weeks as this first set of updates was applied to SMART. There were some unforeseen challenges that made this difficult for our staff as well as most users. At this time we are not aware of any outstanding issues attributable to the updates.

Travel and Expense

- The Send Back feature in the Travel and Expense module is now available. This feature allows an approver to send a Cash Advance, Travel Authorization or Expense Report back to the submitter for revision.
- The Journal Expense Report, Accounting Detail page will now accept the addition of cash lines. Please refer to the job aid titled "Travel and Expense Journals" for detailed instructions on adding cash lines.
- The Journal Expense Report page will now generate a message to warn users when they have not selected any lines to submit for posting.

Asset Management

- The Transaction loader process AMIF1000 was modified so that the user will not get an error message when doing adjustments from AP on suspended assets. (Suspended assets are ones that have had depreciation suspended manually.)
- The depreciation process was modified to generate a prior depreciation entry when cost is added to a fully depreciated asset.

SMART Vendor Changes

- Vendor Summary Page

Path: Vendors > Vendor Information > Add/Update > Vendor > Summary Tab

Prior to the software update: The vendor summary page would *not display* address 1 if the address was set to inactive.

After the software update: When looking at vendor information in SMART, the summary tab now *displays* address 1 if the vendor has been approved but address 1 has been set to inactive. This can happen when the vendor is approved by D of A for use, but address 1 fails to make it through the address verification process that runs at night. Now, when looking at the vendor information, users should first note if the vendor has the status of approved on the summary tab, then go to the address tab to verify the address is active before initiating a payment to the vendor.

- Zip Code

Path: Vendors > Vendor Information > Add/Update > Vendor > Address Tab

Prior to the software update: When entering the Postal information for Vendor Addresses, the code was formatted with a dash as the user tabbed out of the field.

After the software update: The dash was not defaulting as the user tabbed out of the field. Since the correct format is xxxxx-xxxx, other system edits expected the address to be saved in that format. Effective on 8/16/2012, users will notice that the defaulting of the dash has been restored.

Accounts Payable

- Adding an Accounts Payable Voucher, Worksheet Copy Option, Purchase Order Only

Path: Accounts Payable > Voucher > Add/Update > Regular Entry

Prior to the software update: If there had been multiple receipts created against the PO prior to pulling the PO into a voucher, when the voucher was matched, the matched Qty and Amt would be duplicated in the matching tables. This was seen on the PO Activity Summary page [Purchasing > Purchase Order > Review PO Information > Activity Summary].

After the software update: The quantity and amounts will be calculated correctly when the matching process is ran for a voucher that pulled in a PO with multiple receipts against it.

Purchasing

- Adding or Updating a PCard Number

Path: Purchasing > Procurement Cards > Definitions > Cardholder Profile

Prior to software update: Users had to leave the "Display Unmasked Card Number" unchecked when adding or updating a PCard number.

After the software update: Users can add or update a PCard when the "Display Unmasked Card Number" check box is on or off.

- Adding a New Value in Purchasing Receipts

Path: Purchasing > Receipts > Add/Update Receipts > Add a New Value

Prior to software update: It was possible to over receive against an amount only PO.

After the software update: New edits will prevent the ability to over receive against an amount only PO.

Strategic Sourcing

- Bidder Group Search

Path: Sourcing > Create Events > Event Details > Bidder Invitations (link)

Prior to software update: Bidder groups were not available from the Bidder Search page when creating a bid event.

After the software update: Bidder groups will be available from the Bidder Search page.

- Invite Bidders

Path: Sourcing > Create Events > Event Details > Bidder Invitations (link) > Bidder Details (icon)

Prior to software update: The "Look Up" icon beside the Contact Seq Num field does not provide any results.

After the software update: The "Look Up" icon beside the Contact Seq Num field will produce a list of contacts. When you select a contact, the contact's email address is pulled into the event.

- Event Details

Path: Sourcing > Event Responses > Create Bidder Responses

Prior to software update: Commas and line spacing is not retained in the bidder responses.

After the software update: Commas and line spacing is now retained in bidder responses.

- Editing an Event using New Version

Path: Sourcing > Maintain Events > Event Workbench

Prior to software update: Editing an event by using a new version creates an "Event Invite" notification to the bidders/vendors.

After the software update: Editing an event by using a new version will create an "Event Edit" notification to all bidders/vendors whether they are newly invited or not.

- Editing an Event using New Version

Path: Sourcing > Maintain Events > Event Workbench

Prior to software update: Only the creator of the event sees the new version icon and can edit the strategic sourcing event.

After the software update: Any user with the RFX_PROCESSOR role can edit an event using the new version icon. Now, if a user with the RFX_PROCESSOR role creates a new version of an event on the behalf of someone else, the event will show on their list [Only Show Events I created] on the Event Workbench and not the individual who created the event.

- Preview PDF & Post

Path: Sourcing > Maintain Events > Event Workbench

Prior to software update: When a user Posted an event, if there is a line level attachment and the "Include in Notification" box is checked but the "Display to Bidder" box is not checked, no email is sent.

After the software update: When the "Include in Notifications" box is checked but the "Display to Bidder" box is not checked, an email will be sent and the line attachment will be included. This happens when you select the 'Preview PDF' button as well.